Enter Waiting List Placement and Removal

Summary

> **NOTE:** Due to the dynamics of state government and the changing needs for the OASAS CDS (Client Data System), some items in this User Guide might have been removed from the live CDS. Similarly, some new information may appear in the live system that is not reflected in this User Guide. To find the most updated versions of CDS forms and instructions, click the Forms and Instructions tab on the page OASAS Applications Home, located under CDS Documentation.

This User Guide reviews how to place an applicant on your program's waiting list in the Client Data System (CDS) and how to remove an applicant.

There are two sections in this User Guide:

- Enter New Waiting List Applicant

- Removal from the Waiting List

NOTE: It would be helpful to be logged into the OASAS Client Data System application to better follow this User Guide. For more information on logging into the OASAS Client Data System application, please review the Login and Change Password Tutorial or User Guide on the OASAS Applications Home page, located at https://apps.oasas.ny.gov/portal/page/portal/OASAS_APPS.

Step	Instructions	Image
1	Welcome to the "Enter Waiting List Placement and Removal" User Guide. After you log into the OASAS Applications, you will be taken to the *OASAS Applications* page. To access OASAS Applications, you will click the **Applications** tab.	

Step	Instructions	Image
2	To open the CDS Application, click the **Client Data System** link to go to the "*CDS Home*" page.	

Step	Instructions	Image
3	This is the "*CDS Home*" page. From here you can choose any of the links shown. To enter an applicant on the waiting list, you will first need to click the **Waiting List** link.	
4	Here you see the "*Waiting List Search*" page. To enter an applicant, click the **New Waiting List** button.	

Step	Instructions	Image
5	This brings you to the "*Enter New Waiting List*" page. From here you will use the dropdown list to select the program to enter the waiting list placement.	
6a	You can use the mouse to open the dropdown list and select a Program. Click the **down arrow** for the Program field to open the dropdown list.	

Step	Instructions	Image
6b	Next, select the appropriate program from the Program dropdown list. This User Guide example shows how to place an applicant on the "139 – Brighter Tomorrows-CD Inpatient Rehab" waiting list.	**Enter New Waiting List** Provider : 99998 - Brighter Tomorrows, Inc. ✱ Program : 126 - Brighter Tomorrows-CD OP Clinic 128 - Brighter Tomorrows - CD OP Clinic II 139 - Brighter Tomorrows-CD Inpatient Rehab 237 - Brighter Tomorrows - Meth Tx Clinic 1411 - Brighter Tomorrows -- CD Comm Res 1412 - Brighter Tomorrows - Support Living 1426 - Brighter Tomorrows-CD IntRes w/Child 1465 - Brighter Tomorrows -CD RRSY ✱ Sex : ✱ Birth Date : ✱ La (mm/dd/yyyy)
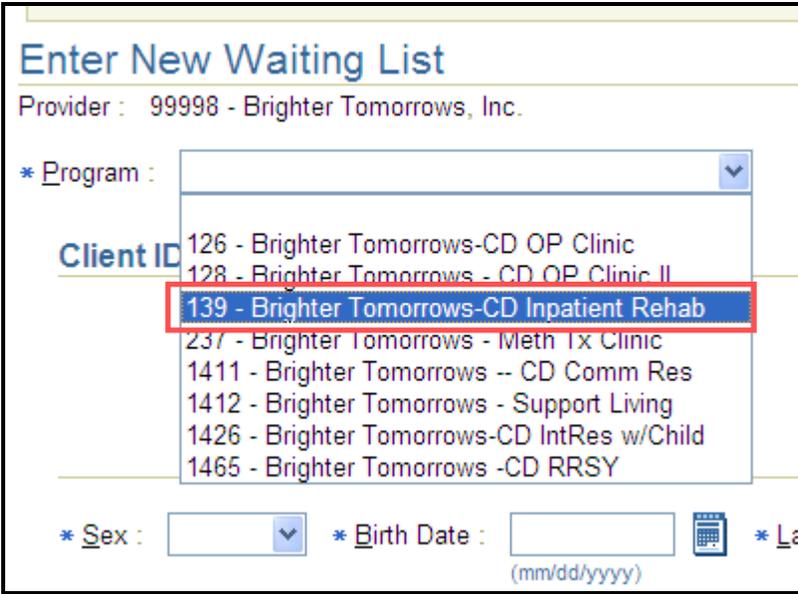
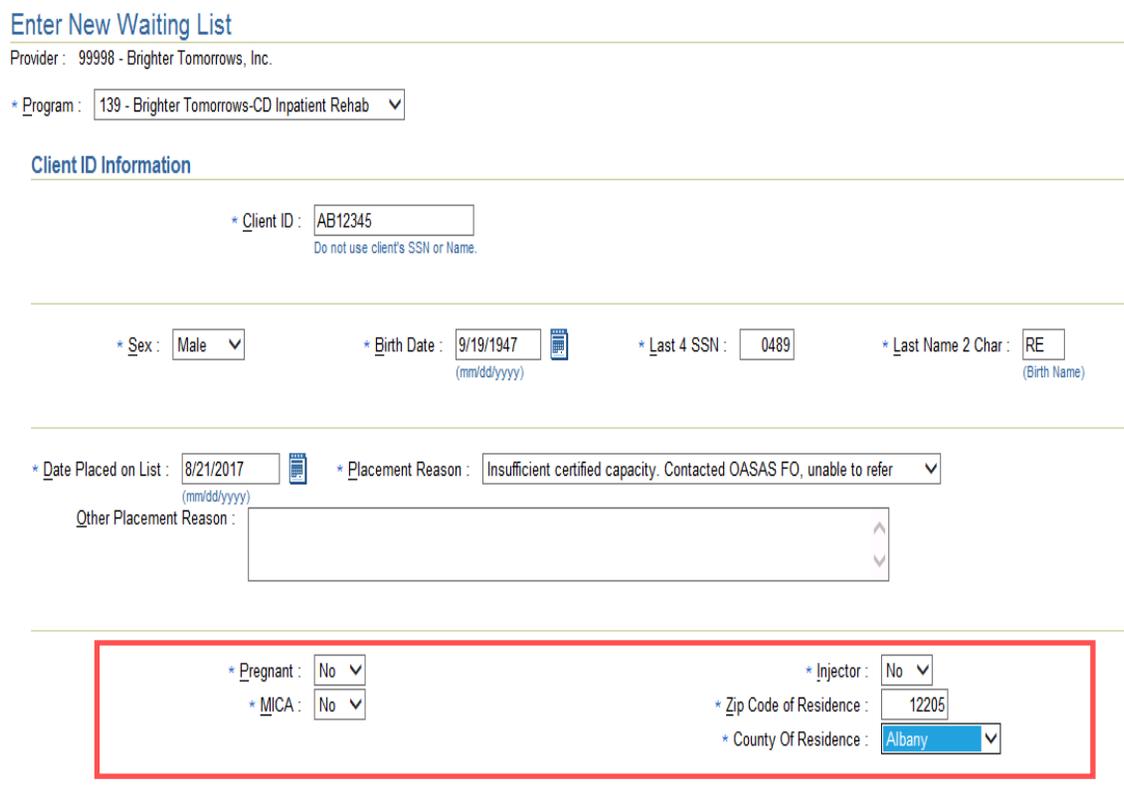| Step	Instructions	Image
7	Fill in the remaining fields. The next several pages contain screenshots of what a filled in form might look like. Begin with the Client ID. The Client ID can be up to 20 alpha-numeric digits in length. It cannot start with a zero or a space and cannot end with a space.	**Enter New Waiting List** Provider : 99998 - Brighter Tomorrows, Inc. * Program : 139 - Brighter Tomorrows-CD Inpatient Rehab **Client ID Information** * Client ID : AB12345 Do not use client's SSN or Name. * Sex : Male * Birth Date : 9/19/1947 (mm/dd/yyyy) * Last 4 SSN : 0489 * Last Name 2 Char : RE (Birth Name) * Date Placed on List : 8/21/2017 (mm/dd/yyyy) * Placement Reason : Insufficient certified capacity. Contacted OASAS FO, unable to refer Other Placement Reason : * Pregnant : No * Injector : No * MICA : No * Zip Code of Residence : 12205 * County Of Residence : Albany

Step	Instructions	Image
8	Fill in the data items that make up the client's tracking ID. This includes: Sex, Birth Date, Last 4 SSN, and Last Name 2 Char.	

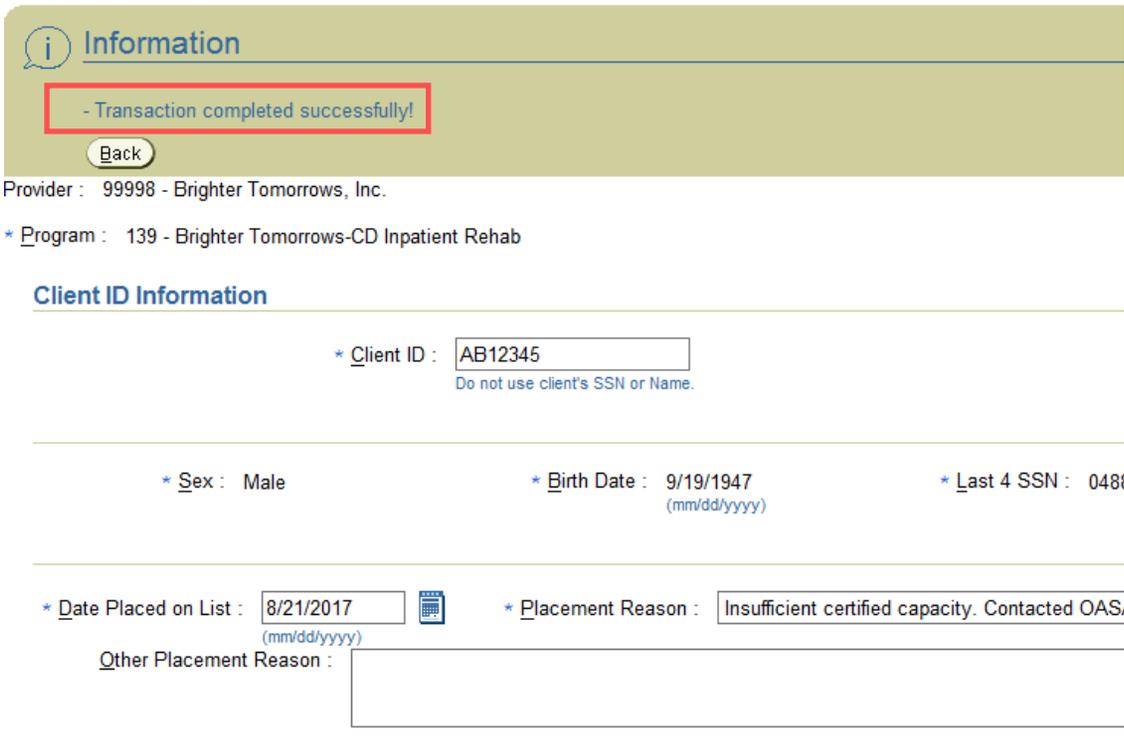| Step	Instructions	Image
9	**NOTE: When completing the field Last Name 2 Char, be sure to use the letters of the applicant's birth name (e.g., maiden name).**	

Step	Instructions	Image
10a	Next enter the Date Placed on List. The date you enter is the date that the applicant has been determined to be eligible for admission into the program but were unable to admit. You can enter the date by typing the date into the textbox (MM/DD/YYYY) or using the calendar icon seen next to the Date Placed on List textbox. Next, select a Placement Reason from the dropdown by clicking on the down arrow.	**Enter New Waiting List** Provider : 99998 - Brighter Tomorrows, Inc. * Program : 139 - Brighter Tomorrows-CD Inpatient Rehab **Client ID Information** * Client ID : AB12345 Do not use client's SSN or Name. * Sex : Male * Birth Date : 9/19/1947 * Last 4 SSN : 0489 * Last Name 2 Char : RE (mm/dd/yyyy) (Birth Name) * Date Placed on List : 8/21/2017 * Placement Reason : Insufficient certified capacity. Contacted OASAS FO, unable to refer (mm/dd/yyyy) Other Placement Reason : * Pregnant : No * Injector : No * MICA : No * Zip Code of Residence : 12205 * County Of Residence : Albany
10b	*If 'Other' is selected, a brief narrative demonstrating why the individual was placed on the waiting list rather than admitted will be required in the text box directly beneath the dropdown selection.	* Date Placed on List : 8/21/2017 * Placement Reason : Other (mm/dd/yyyy) Other Placement Reason : Client is in process of relocating to this area. * Pregnant : No * Injector : No * MICA : No * Zip Code of Residence : 12205 * County Of Residence : Albany
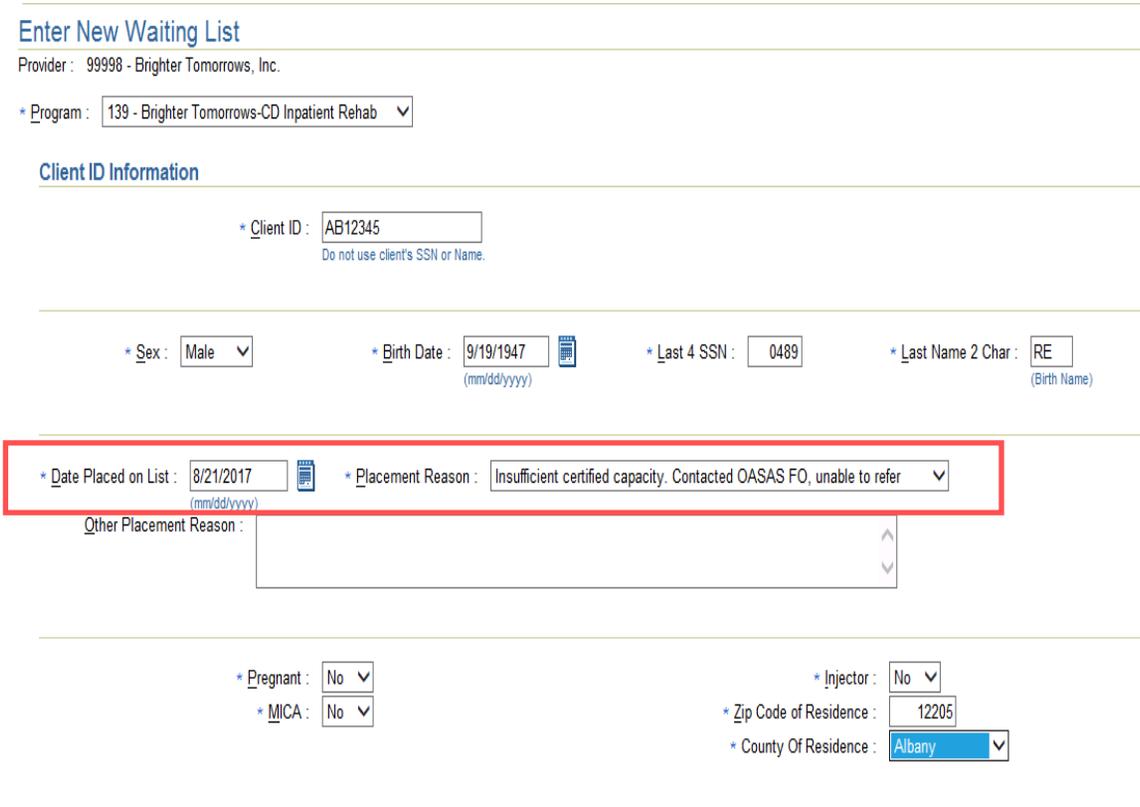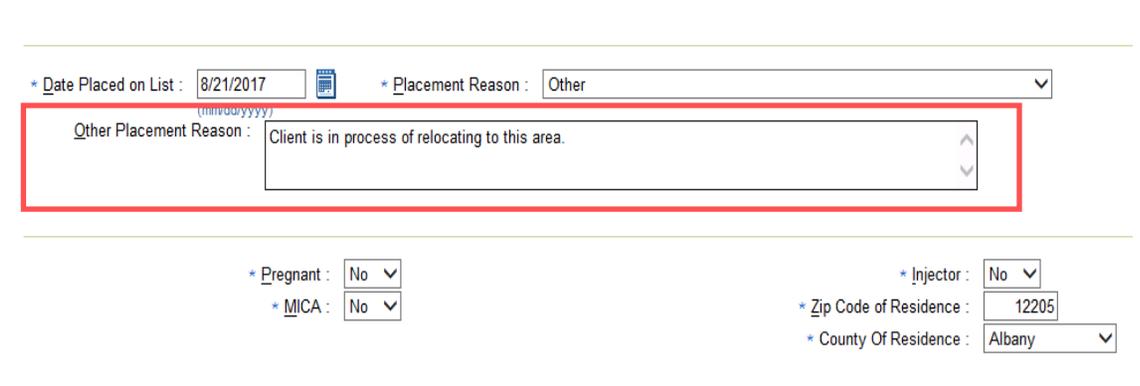
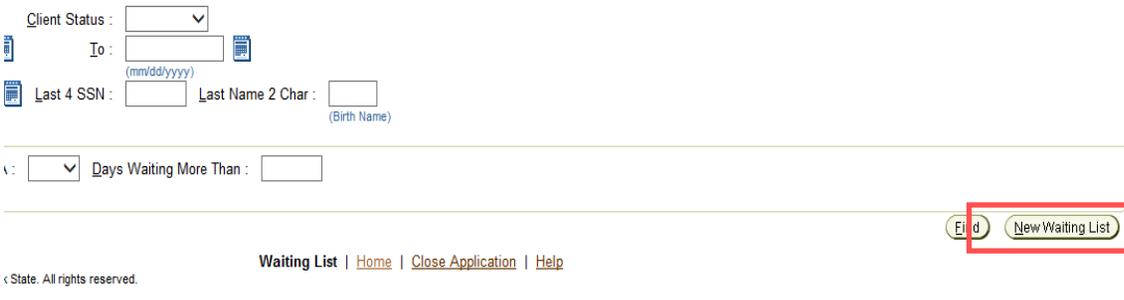| Step	Instructions	Image
11	Additional demographic information is required such as: Pregnant, MICA, Injector, Zip Code of Residence and County of Residence.	
12	NOTE: The OASAS system matches the Zip Code field to the County field, so be sure that the zip code you are using is in the county you choose. If not, you will receive an error message.	

Step	Instructions	Image
13	Finally, click the **Save** button to save the completed placement.	

Step	Instructions	Image
14	When the transaction has been saved, you will see the following confirmation message: "**Transaction completed successfully**."	ⓘ **Information** - Transaction completed successfully! [Back] Provider : 99998 - Brighter Tomorrows, Inc. * Program : 139 - Brighter Tomorrows-CD Inpatient Rehab **Client ID Information** * Client ID : AB12345 Do not use client's SSN or Name. * Sex : Male * Birth Date : 9/19/1947 * Last 4 SSN : 0488 (mm/dd/yyyy) * Date Placed on List : 8/21/2017 * Placement Reason : Insufficient certified capacity. Contacted OAS, (mm/dd/yyyy) Other Placement Reason :
15	To continue entering applicants on the waiting list, click the **Back** button.	ⓘ **Information** - Transaction completed successfully! [Back] Provider : 99998 - Brighter Tomorrows, Inc. * Program : 139 - Brighter Tomorrows-CD Inpatient Rehab **Client ID Information** * Client ID : AB12345

Step	Instructions	Image
16	On the next screen, click New Waiting List, found on the bottom right of the screen, to add another application.	
17	To return to the "*CDS Home*" page to perform a different task, you would click the **Home** button at the top of the page.	

Removal from the Waiting List

Step	Instructions	Image
18	The next part of this User Guide will show you the process of searching for and removing an applicant from the waiting list in the CDS System. NOTE: Once an applicant who is on the waiting list has been admitted into the same program, his/her information will automatically be removed from the waiting list. If the applicant is not admitted to same program, he/she must be removed them from the Waiting List, even if admitted to another program within the same provider. From the "*CDS Home*" page, you will click on the **Waiting List** link to open the "*Waiting List Search*" page, where you will select an applicant to remove from the waiting list.	 **CDS Home** * Provider [99998] [Brighter Tomorrows, Inc.] **Actions** Admission Discharge Opioid Treatment Annual Update Element Transition Crisis Episode Client Management Transfer Assessment Waiting List CDS Home	Home	Close Application	Help
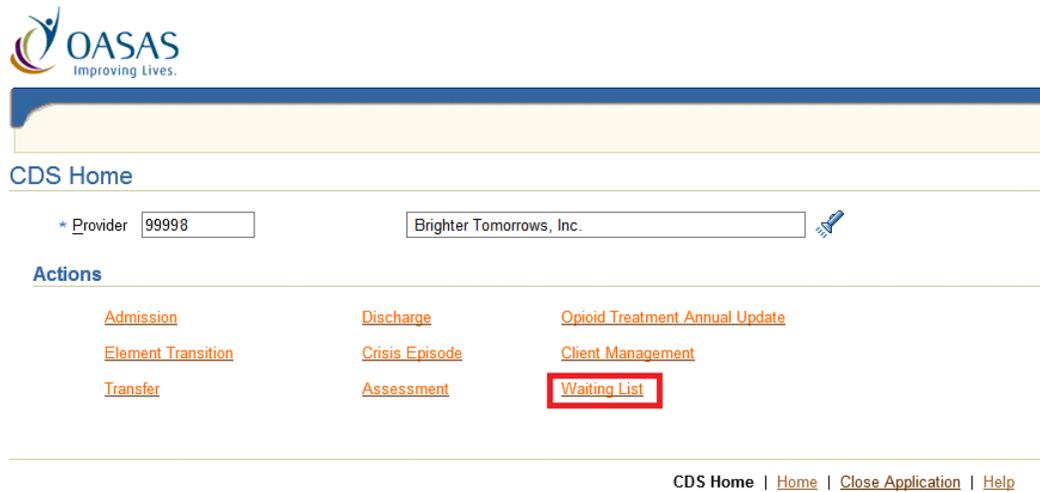
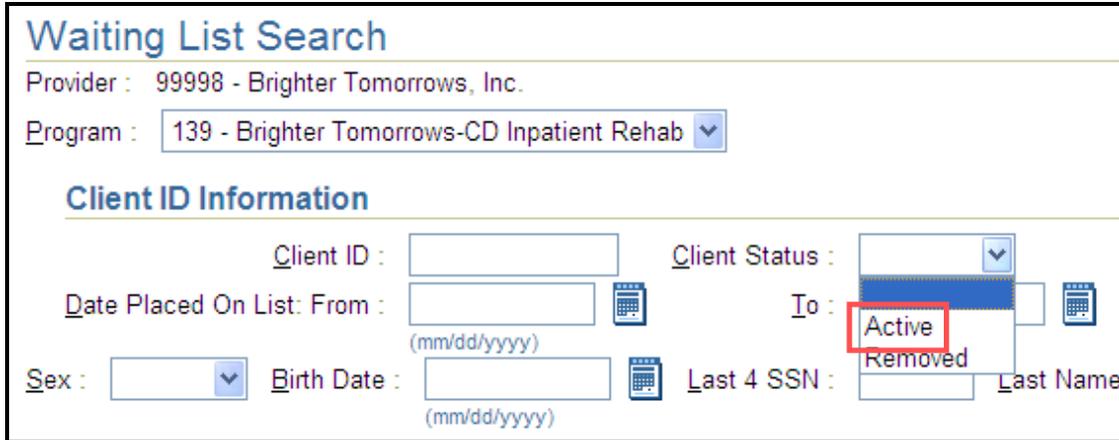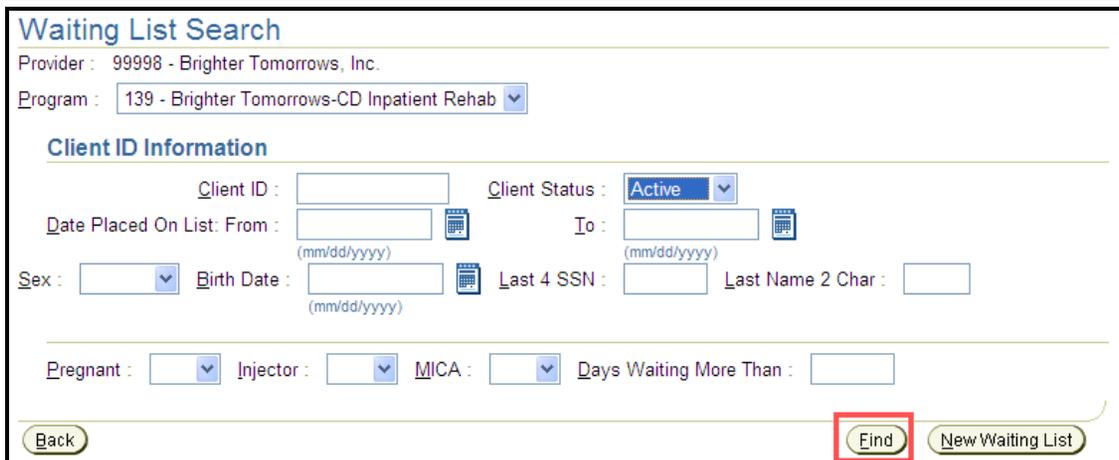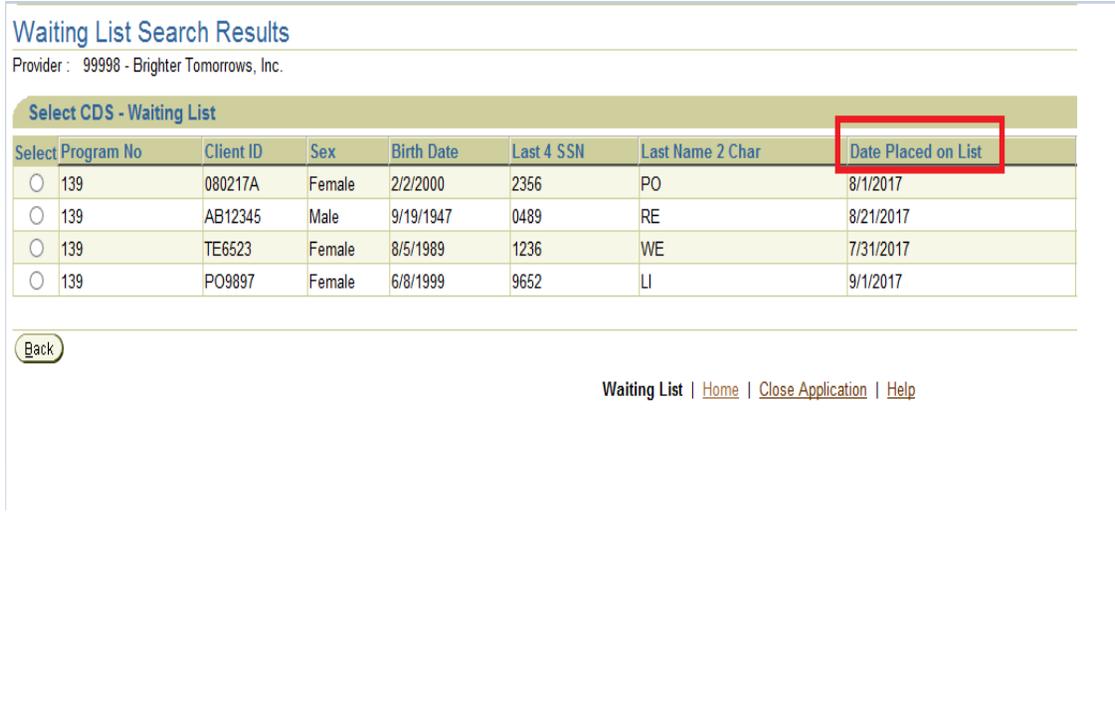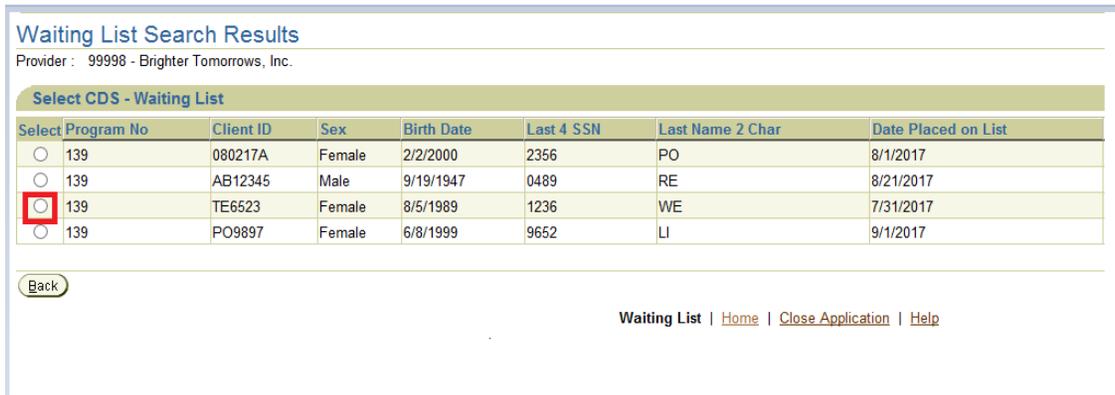| Step	Instructions	Image
19	This brings you back to the "*Waiting List Search*" page, as shown here. First, you will use the dropdown list to select the Program from which the applicant is to be removed. You can use the mouse to open the dropdown list and select a Program. First, click the **down arrow** for the Program field to open the dropdown list.	

Step	Instructions	Image
20a	Then, select the appropriate program from the Program dropdown list.	

Step	Instructions	Image
20b	Next, you must either enter specific applicant identifying information under the **Client ID Information** section to select one applicant or, instead, leave the information blank to get a list of all applicants on the selected program's waiting list. If program information is left blank, you will get a list of all applicants on the waiting lists of all of the provider's programs. In this User Guide example, all of the applicant identifying information is being left blank, except for Client Status, which is set as **Active**. This will result in a list of all active applicant names that are on the waiting list for the chosen program. NOTE: When removing an applicant from the waiting list, it is often helpful to choose a Client Status of **Active** to limit the search results list to only those currently on the list. To do this, first click the **down arrow** for the Client Status field to open the dropdown list.	**Waiting List Search** Provider : 99998 - Brighter Tomorrows, Inc. Program : 139 - Brighter Tomorrows-CD Inpatient Rehab **Client ID Information** Client ID : Client Status : Date Placed On List: From : To : (mm/dd/yyyy) (mm/dd/yyyy) Sex : Birth Date : Last 4 SSN : Last Name 2 Char : (mm/dd/yyyy)

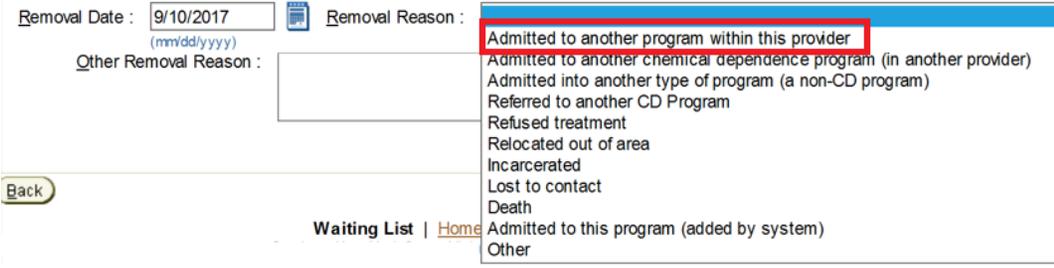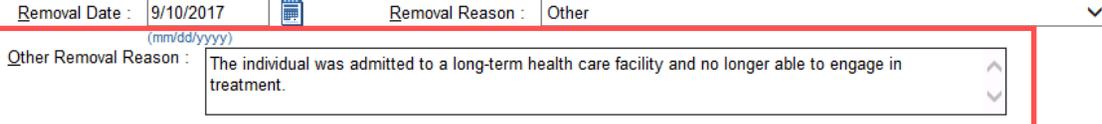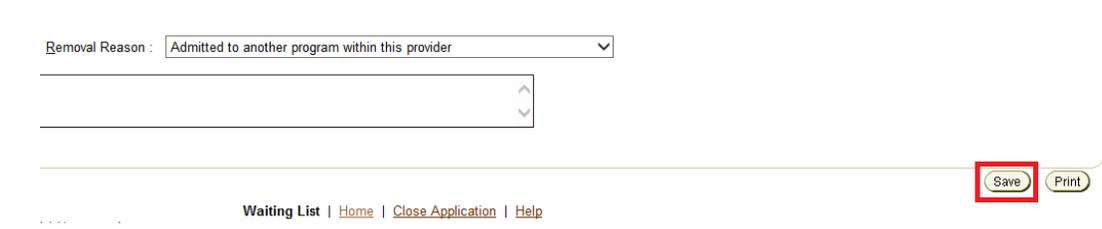| Step	Instructions	Image
2	Next, select "**Active**" from the Client Status dropdown list.	
22	Finally, click the **Find** button to view the list of clients on the waiting list.	

Step	Instructions	Image
23	This brings you to the "*Waiting List Search Results*" page. If you have a long list of results, then you may want to sort the results according to some criteria. This page allows you to sort by any criteria visible on the page, e.g., Program No, Birth Date or Date Placed on List. Simply click the shaded column heading to sort the results of that field in ascending order. If you want to reverse the order of the sort (i.e., descending order), click the same shaded column heading again. For example, if you click on the Date Placed on List column heading, it will start the list with the oldest entry. If you click on it again, it will start with the newest. In this example, we click on the **Date Placed on List** column heading to sort the list.	
24	Here you see the results list resorted by Date Placed on List (i.e., from least to most recent). For this User Guide, we have chosen to remove the third applicant. To select the applicant that you wish to remove, you must click the **Select** radio button (◯) next to the chosen client.	

Step	Instructions	Image
25	Next you will click the **Update** button to open the "*Edit Waiting List*" page.	
26	You now see the "*Edit Waiting List*" page containing the selected applicant's information. NOTE: In addition to removing an applicant from the waiting list, you may also use this screen to edit existing information for an applicant. You must scroll down to see the Removal Date and Removal Reason fields.	

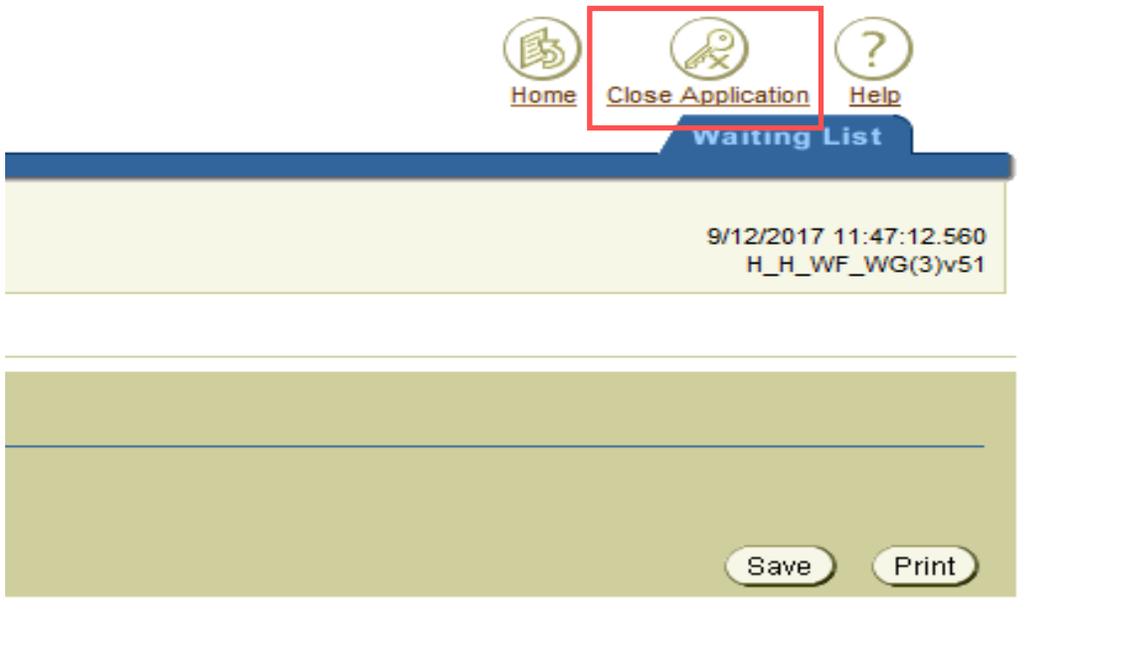| Step	Instructions	Image
27	You must enter the date that the applicant is being removed from the waiting list into the Removal Date field. To do this, you can type the date in the textbox or click on the calendar icon next to the Removal Date textbox. For this User Guide, we are using the date of "**09/10/2017**."	* Date Placed on List : 8/21/2017 * Placement Reason : Insufficient certified capacity. Contacted OASAS FO, unable to refer (mm/dd/yyyy) Other Placement Reason : * Pregnant : No * Injector : No * MICA : No * Zip Code of Residence : 12205 * County Of Residence : Albany Removal Date : Removal Reason : (mm/dd/yyyy) Other Removal Reason :
28	Once you have entered the Removal Date, press the **Tab** key twice to move to the Removal Reason field or use the mouse to click on the dropdown. This Removal Reason field has a dropdown list containing ten different reasons that an applicant might be removed from the waiting list. Next, click on the **down arrow** for the Removal Reason field.	Removal Date : 9/10/2017 Removal Reason : (mm/dd/yyyy) Other Removal Reason :
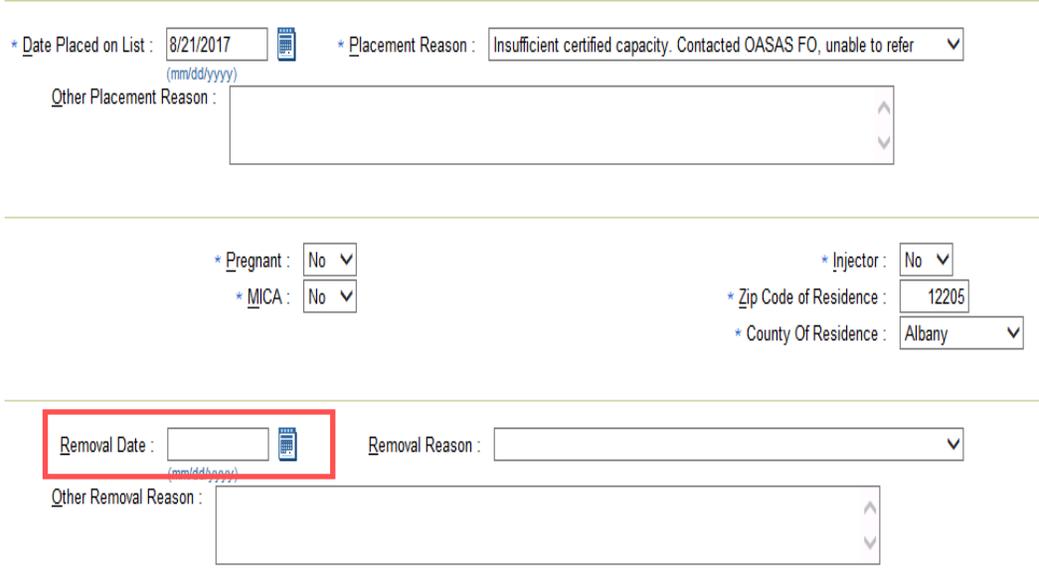
Step	Instructions	Image
29a	Select the appropriate entry from the Removal Reason field. For this User Guide example, "Admitted into another program within this provider" is selected.	Removal Date: 9/10/2017 (mm/dd/yyyy) Removal Reason: Other Removal Reason: **Admitted to another program within this provider** Admitted to another chemical dependence program (in another provider) Admitted into another type of program (a non-CD program) Referred to another CD Program Refused treatment Relocated out of area Incarcerated Lost to contact Death Admitted to this program (added by system) Other Back Waiting List | Home
29b	If 'Other' is selected from the dropdown list, then a brief narrative must be entered in the Other Removal Reason text box.	Removal Date: 9/10/2017 (mm/dd/yyyy) Removal Reason: Other Other Removal Reason: The individual was admitted to a long-term health care facility and no longer able to engage in treatment.
30	Click the **Save** button to complete the removal transaction.	Removal Reason: Admitted to another program within this provider Save Print Waiting List | Home | Close Application | Help

Step	Instructions	Image
31	When the transaction has been saved, you will see the following confirmation message: "*Transaction completed successfully*." This indicates that the person has been successfully removed from the list of Active applicants.	

Step	Instructions	Image
32	To return to the "*CDS Home*" page to perform a different task, you can click **Home** at the top of the page.	

Step	Instructions	Image
33	Once you are finished entering transactions, you can return to the *OASAS Applications* page by clicking on the **Close Application** button to exit the application.	